Voyager® with Unicode™ Call Slip Dæmon User's Guide

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About This Document

Purpose

This document provides instructions for customizing Voyager Call Slip Dæmon, and steps for processing call slip requests.

Intended Audience

This document is intended for Voyager customers who process call slip requests and/or need to tailor the call slip function for the institution's use.

Reason for Reissue

This user's guide is being reissued for the following reasons.

- New function
  - Manual reassignment of Call Slip requests
  - Selection of substitute items to fill Call Slip request
  - Display of Call Slip Reassignment History
  - UB (Universal Borrowing) Promote Request History
- Implementation of new document formatting standards
  - About chapter changes

- New procedure text
- New cross-referencing format

How to Use This Document

This document consists of the following segments:

Chapter 1	"Getting Started" Chapter 1 provides the prerequisites for using Voyager Call Slip Dæmon and other considerations for getting started.
Chapter 2	"Overview of Call Slip Dæmon" Chapter 2 provides a brief functional overview of Voyager Call Slip Dæmon.
Chapter 3	"Processing Call Slip Requests" Chapter 3 details the steps for processing call slip requests.
Chapter 4	"Customizing Your System" Chapter 4 details customizing options for Voyager Call Slip Dæmon.
Index	The Index is an alphabetical, detailed cross-reference of topics about the information contained within this document.

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- Keyboard commands (such as **Ctrl** and **Enter**) are displayed in **bold**.
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- The names of menus or status display pages and required selections from menus or status display pages such as “From the **Applications** drop-down menu, select **System-wide**,” are displayed in **bold** type.
- Object names on a window’s interface, such as the **Description** field, the **OK** button, and the **Metadata** tab, are displayed in **bold** type.
- The titles of documents such as *ENCompass Web Client User’s Guide* are displayed in *italic* type.
- Caution, and important notices are displayed with a distinctive label such as the following:

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Extra information pertinent to the topic.

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Information you should consider before making a decision or configuration.

CAUTION:
Information you must consider before making a decision, due to potential loss of data or system malfunction involved.

TIP:
Helpful hints you might want to consider before making a decision.

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Preferred course of action.

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Getting Started

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Getting Started

1

Introduction

This chapter describes the prerequisites for beginning work in Voyager Call Slip Dæmon.

Purpose of this Chapter

This chapter's purpose is to provide:

- Prerequisites for using and tailoring Voyager Call Slip Dæmon.
- Instruction for logging in to Voyager Call Slip Dæmon.

Prerequisite Skills and Knowledge

To use this document effectively, you need knowledge of the following:

- Basic Microsoft Interface navigation
- Basic UNIX commands and navigation
- Basic Voyager System Administration Module

Before You Begin

Before you can customize Voyager Call Slip Dæmon, the client and server components must be installed and running. Review the following information to prepare for using Voyager Call Slip Dæmon.

Checklist

You must complete the following tasks to process call slip requests in Voyager Call Slip Dæmon.

- Enter Call Slip Definitions in the Voyager System Administration module
- Enter Call Slip Rules in the Voyager System Administration module
- Enter No-Fill Reasons in the Voyager System Administration module

Optionally, you may also want to complete the following tasks.

- Customize print options in the `callslip.ini` file
- Customize email options in the `callslip.ini` file
- Enter call slip status codes in the `opac.ini` file
- Customize Messages in Voyager System Administration OPAC Configuration
- Customize printing options in the `circ.ini` file

Help

Use the online help function through the **Help** Menu to assist with your questions while using Call Slip Dæmon.

Figure 1-1. Help menu

You can also access context-sensitive help by pressing **F1**.

For additional help, use the Knowledge Base or Resource Sharing capability located in Endeavor's Support Web that can be accessed through Endeavor's home page on the Internet.

Log In

When you launch Voyager Call Slip Dæmon, a log-in window displays. Use the following to log into Voyager Call Slip Dæmon.

Procedure 1-1. Logging In

1. Enter your **Operator ID** and **Password**. See Figure 1-2.

   NOTE:
   The **Operator ID** and **Password** are set up by the Voyager System Administrator through the Security Configuration function within the Voyager System Administration module.

2. Click **OK**.

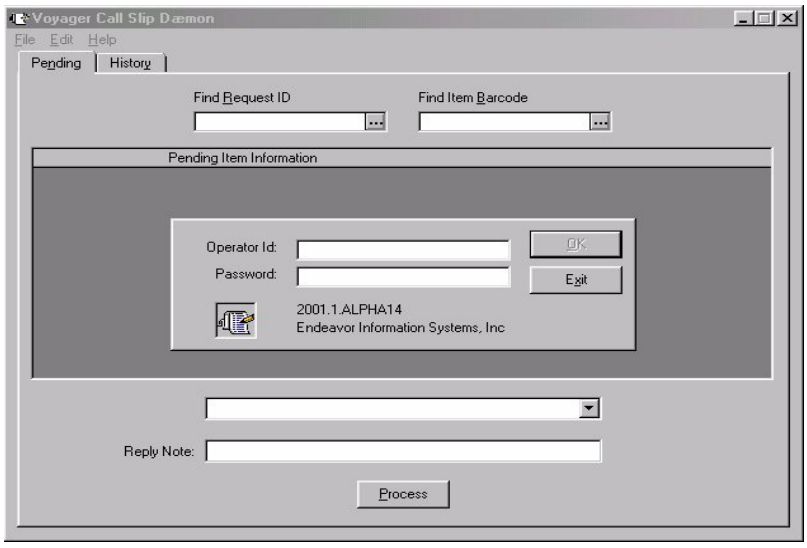

Figure 1-2. Call Slip Dæmon log-in window

3. (Optional) Select the **Call Slip Group**, and click **OK**. See Figure 1-3.

Result: The first time staff log in to Voyager Call Slip Dæmon the **Call Slip Group** needs to be selected. This selection is then permanently stored in the `callslip.ini` file in the `LocationCode` field under the `[General]` stanza thus eliminating the need to repeat this step. See LocationCode= Variable on page 4-15 for more information.

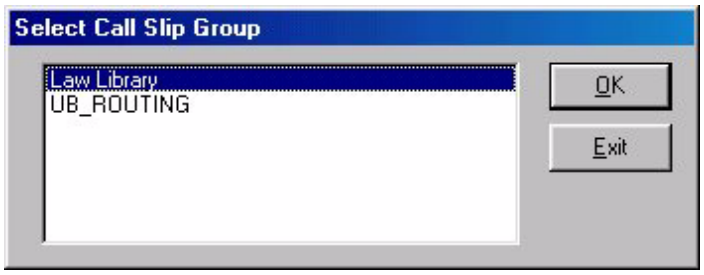

Figure 1-3. Select Call Slip Group

Login Information

You can display your **Operator Name**, **Operator ID**, **Location**, and **Process Method** by selecting **Login Information** from the **File** menu. See Figure 1-4.

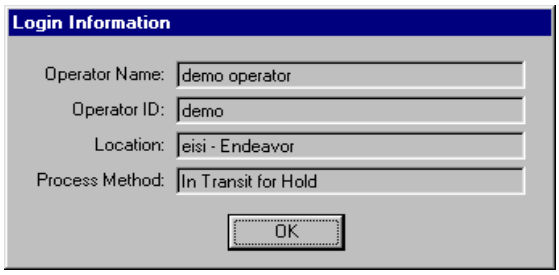

Figure 1-4. Call Slip Dæmon Login Information dialog box

Your **Process Method** determines what happens to an item once you process and fill a call slip request. Your **Process Method** may be one of three following possibilities:

- Place on Hold
- In Transit for Hold
- Charge to Patron

See *Call Slip Definitions* in the *Call Slip (Closed Stacks)* section of the *Voyager System Administration User's Guide* for more detailed information about Call Slip Process Methods.

Overview of Call Slip Dæmon

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Overview of Call Slip Dæmon

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What Is Voyager Call Slip Dæmon?

Voyager Call Slip Dæmon is a tool designed to enhance the productivity of library staff when processing call slip requests from patrons. Requests can be handled immediately when submitted by a patron or queued up and handled as a group of requests. Call Slip Dæmon is designed to be flexible to meet the scheduling requirements of library staff everywhere.

Call Slip Dæmon incorporates many features to enhance the processing of call slip requests such as:

- Virtually unlimited pre-set formatting options for printing call slip requests
- Optional Automatic Print New Request feature
- Email facility to communicate the status of processed requests to the requestor
- Time-saving stored responses from which to select
- Free-key area to include non-standard responses to requests
- Update Interval option to specify how often to update the Call Slip Dæmon request queue
- Optional Alert Sound feature providing an audio signal to notify staff of a new incoming request

Functional Overview

Voyager Call Slip Dæmon combines menu options and a tabbed screen interface to aid library staff in navigating and processing call slip requests.

Menu Items

Call Slip Dæmon provides the following three menus for easy access to functions:

- **File** Menu
- **Edit** Menu
- **Help** Menu

File Menu

The **File** menu provides the main functions for Call Slip Dæmon such as get requests, print requests, and set preferences. See Figure 2-1.

Figure 2-1. File menu

A description of each **File** menu function is defined in Table 2-1 on page 2-2.

Table 2-1. File Menu

Menu Item	Description
Get Requests	Retrieves new call slip requests from the server.
Login Information	Displays your operator name, operator ID, and location.

Table 2-1. File Menu

Menu Item	Description
Print	Displays a cascading menu. Selected prints the particular call slip request(s) that is highlighted on the Pending tab. New prints all of the new call slip requests that have not yet been printed. All prints all of the call slip requests on the Pending tab.
Print Setup	Allows you to choose and set up a printer.
Preferences	Displays the Preferences dialog box.
Exit	Exits the Call Slip module.

Edit Menu

The **Edit** menu provides the functions for processing call slip requests. See Figure 2-2.

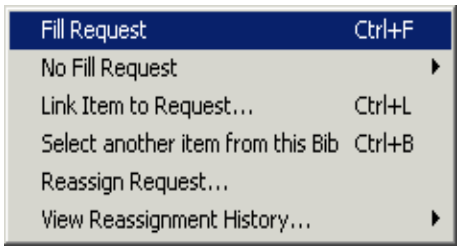

Figure 2-2. Edit Menu

A description of each **Edit** menu function is defined in Table 2-2 on page 2-3.

Table 2-2. Edit Menu

Menu Item	Description
Fill Request (Ctrl+F)	Processes the request that is currently highlighted on the Pending tab as a Filled Request. The processed request then displays on the History tab.

Table 2-2. Edit Menu

Menu Item	Description
No Fill Request	Displays a menu of No Fill reasons (only the first 20 of the total list of No Fill reasons). Selecting a No Fill reason processes the request that is currently highlighted on the Pending tab as a No Fill Request. The processed request then displays on the History tab.
Link Item to Request (Ctrl + L)	Displays the Link Item dialog box.
Select another item from this Bib	Displays list of items for the active bibliographic record from which to select.
Reassign Request	Displays list of call slip queues.
View Reassignment History	Displays reassignment history for the highlighted call slip request.

Help Menu

The **Help** menu provides information about how to use Call Slip Dæmon and information about which version is installed. See Figure 2-3.

Figure 2-3. Help menu

A description of each **Help** menu function is defined in Table 2-3 on page 2-4.

Table 2-3. Help Menu

Menu Item	Description
Help Topics	Displays the table of contents for Call Slip Help and opens the Help Window.
Endeavor on the Web	Connects to Endeavor Support Web or to Endeavor's Home page.

Table 2-3. Help Menu

Menu Item	Description
About Call Slip Dæmon	Displays the copyright notice and version number of your copy of Voyager Call Slip.

Tabbed Functions

The Voyager Call Slip Dæmon contains two tabs **Pending** and **History**. See Figure 2-4.

Figure 2-4. Call Slip Dæmon tabs

The **Pending** tab displays a list of current call slip requests that have been placed.

The **History** tab displays a list of call slip requests that have been processed during the current Call Slip Dæmon session.

The following chapters describe in detail how to use and customize these functions for your environment.

Processing Call Slip Requests

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Processing Call Slip Requests

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Call Slip Requests

Call slip requests in Voyager Call Slip Dæmon are displayed for library staff through the following two tabs.

- **Pending**
- **History**

The **Pending** tab displays new and pending call slip requests.

The **History** tab displays call slip requests that have been processed during the current login session.

This chapter describes in detail the information and functions provided on each of these tabs.

Pending Tab

A list of all new pending call slip requests is retrieved and placed on the **Pending** tab (see Figure 3-1) when you log in to the Call Slip Dæmon. (Dæmon is a Unix process. For this application, it runs and automatically checks and updates the queue for new incoming call slip requests.)

The system automatically updates the **Pending** tab as specified by the setting entered for **Update and Email Send Interval** in Preferences. The length of this interval determines the frequency with which new call slip requests automatically display on the **Pending** tab. See Update and Email Send Interval on page 4-3 for more information.

The **Find Request ID** field and **Find Item Barcode** field (see Figure 3-1) can be used to search for a call slip request on the **Pending** tab. Using these fields can expedite call slip processing by enabling the system to automatically locate a specific call slip request as compared to staff manually scrolling through a long list of requests.

Scanning technology can also be used to enter the required information into either of these fields. To print the Request ID or Item Barcode as a barcode on the call slip printout, see Printing in the Alternate Font on page 4-28.

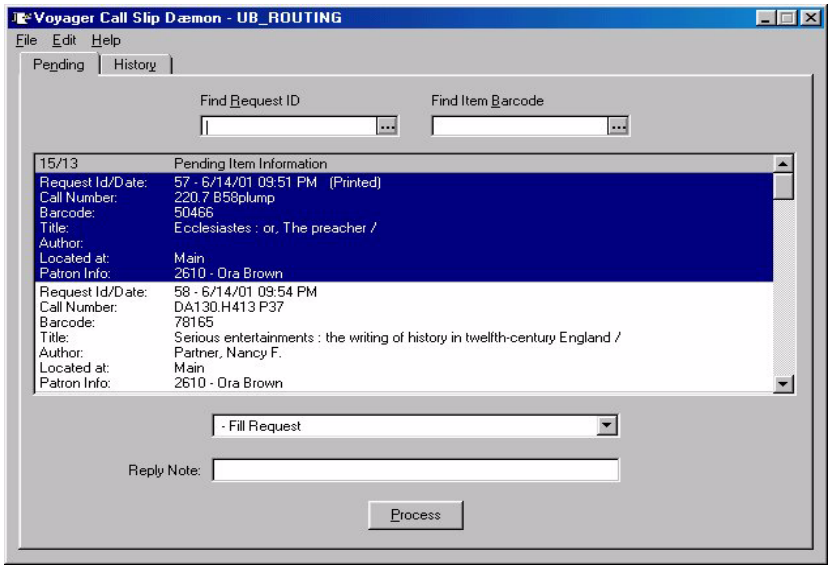

Figure 3-1. Call Slip Dæmon Pending tab

Retrieving Current Requests

To retrieve any new pending call slip requests after you have logged in, select **Get Requests** (see Figure 3-2) from the **File** menu. This queries the server and returns a list of all new pending call slip requests that have been submitted since the last time the queue was updated.

Figure 3-2. Get Requests

Total Requests & Printed Requests

To determine the number of new call slip requests, look for the two numbers displayed in the top left corner of the **Pending Item Information** list box. See Figure 3-3.

The first number is the total number of call slip requests on the **Pending** tab.

The second number is the total number of call slip requests that have not yet been printed.

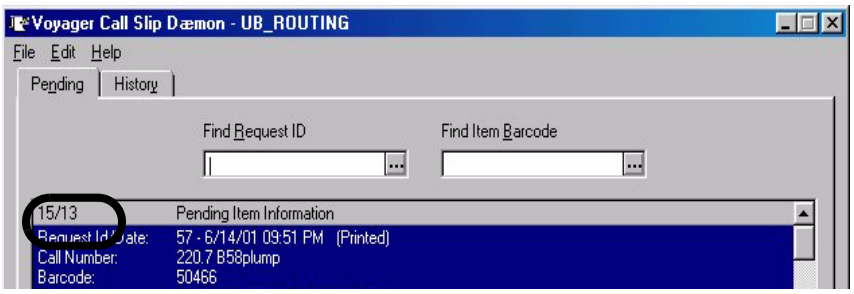

Figure 3-3. Number of call slips pending (total) and number of new call slips (not printed)

The procedure for searching for a pending call slip request is shown in Procedure 3-1, Searching for a Pending Request, on page 3-4.

Procedure 3-1. Searching for a Pending Request

Use the following to search for a pending request by **Request ID** or **Item Barcode**.

1. Enter the **Request ID number** associated with a call slip request in the **Find Request ID** field on the **Pending** tab, or type the **Item Barcode** associated with a call slip request in the **Find Item Barcode** field.

   Optionally, place the cursor in the **Find Request ID** field or the **Find Item Barcode** field; and scan the **Request ID** or **Item Barcode**, respectively.

   Result: This identifies the call slip to search for and activates the **ellipsis** button. This provides quick access to a specific call slip request when there is a long list of pending call slips.

2. Click the **ellipsis button** or press **Enter**.

   Result: The requested call slip displays highlighted on the **Pending** tab

Printing Pending Requests

Call slip requests can be printed from the **Pending** tab. Voyager Call Slip Dæmon print options include the following.

- All highlighted call slip requests
- All new call slip requests that have not yet been printed
- All call slip requests on the **Pending** tab

The Voyager Call Slip Dæmon prints call slip requests according to the options set in the Print Setup dialog box, the Preferences dialog box (see Preferences on page 4-1), and the `[Print Template]` stanza in the `callslip.ini` file. See Defining the Callslip.ini File on page 4-7.

The procedure for using the Print Setup dialog box to set print options is shown in Procedure 3-2, Setting Up and Selecting Your Printer, on page 3-5.

Procedure 3-2. Setting Up and Selecting Your Printer

Printer setup and selection is handled through the **File** menu. Use the following to select a printer and specify its setup.

1. Click the **File** menu.

Figure 3-4. Print Setup option

Result: The **File** options display.

2. Click **Print Setup**.

Result: The standard **Print Setup** Windows dialog box displays. See Figure 3-5.

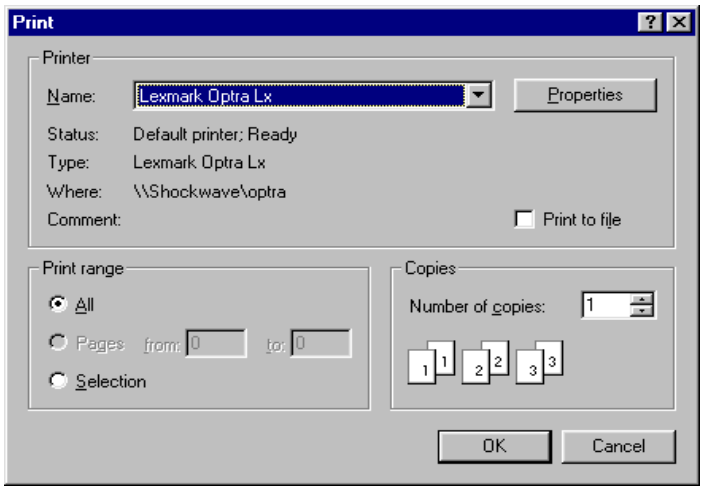

Figure 3-5. Call Slip Dæmon/Windows Print dialog box

3. Follow normal steps to customize your printer setup in Windows using standard Windows **Help (F1)** functions to assist with this process.

   Result: This identifies how and where the information is to print.

4. Click **OK** to store the printer selections for the current Call Slip Dæmon session.

The procedure for printing highlighted call slip requests is shown in Procedure 3-3, Printing Highlighted Call Slip Request(s), on page 3-6.

Procedure 3-3. Printing Highlighted Call Slip Request(s)

Use the following to print highlighted call slip requests.

1. Click the **Pending** tab.

   Result: This displays the list of pending call slip requests.

2. Click to highlight one or more call slip requests.

   Result: This identifies the call slips to be printed.

3. Select **Print** from the **File** menu.

Result: The **Print** options display.

4. Select **Selected** from the cascading menu, or press **Ctrl+S**.

   Result: The request(s) that is highlighted is sent to the printer.

The procedure for printing all new call slip requests is shown in Procedure 3-4, Printing All New Call Slip Requests, on page 3-7.

Procedure 3-4. Printing All New Call Slip Requests

Use the following to print all the new call slip requests.

1. Click the **Pending** tab.

   Result: This displays the list of pending call slip requests. See Total Requests & Printed Requests on page 3-3 for a description of how to determine the number of call slip requests that have not yet been printed.

2. Select **Print** from the **File** menu.

   Result: The **Print** options display.

3. Select **New** from the cascading menu, or press **Ctrl+N**.

   Result: All of the new call slip requests that have not yet been printed are printed consecutively in the order in which they are displayed. See Sort Pending Requests by on page 4-3 for more information about sort order.

   Each call slip request prints on a separate page.

   NOTE:
   File>Print>New is enabled only if there are new call slip requests that have not yet been printed.

The procedure for printing all call slip requests is shown in Procedure 3-5, Printing All Call Slip Requests, on page 3-8.

Procedure 3-5. Printing All Call Slip Requests

Use the following to print all call slip requests.

1. Click the **Pending** tab.
2. Select **Print** from the **File** menu.
3. Select **All** from the cascading menu.

   Result: All of the call slip requests on the **Pending** tab are printed consecutively in the order in which they are displayed. See Sort Pending Requests by on page 4-3 for more information about sort order.

   Each call slip request prints on a separate page.

Filling a Call Slip Request

A call slip request may be processed whether or not it has been printed. When a call slip request is processed from the **Pending** tab, the request is either filled, not filled or reassigned. (Reassigned is described in more detail in Reassign Request on page 3-18.)

What it means to fill a pending call slip request may vary depending on the Call Slip Print Group being processed and how that Call Slip Print Group is configured in the System Administration module.

When a request is processed but not filled, the request is assigned a No Fill Reason such as Damaged Materials (DM), Not Found (NF), or Wrong Location (WL). See *"Call Slip (Closed Stacks)"* in the System-Wide Configuration section of the *Voyager System Administration User's Guide* for more information.

The procedure for processing a pending call slip request using fill and no fill options is shown in Procedure 3-6, Processing a Pending Request Using Fill / No Fill Options, on page 3-8.

Procedure 3-6. Processing a Pending Request Using Fill / No Fill Options

Use the following to process a pending call slip request.

1. Select the request to be processed from the **Pending** tab.

   Result: This highlights the request and makes it active.

2. Select the appropriate option to fill or no fill the pending call slip request using one of the following methods.

   - Select from the drop-down list at the bottom of the **Pending** tab
   - Select from the **Edit** menu
   - Right-click the call slip request and select from the list provided

   Result: This identifies how to process the pending request.

3. (Optional) Enter **Reply Note** text, up to 100 characters, to the requester. This can be done dynamically for each individual call slip request.

   Result: The **Reply Note** displays as part of email sent to requesters of filled and non-filled call slip requests. The **Reply Note** also displays in the Pending Requests Area of the WebVoyáge Patron Information Page for non-filled requests.

4. Click the **Process** button.

   Result: The request transfers from the **Pending** tab to the **History** tab. The **History** tab displays all of the requests that have been processed during the current call slip session.

   Use the **Unprocess** button to undo requests that have processed during the current call slip session. See Figure 3-13.

   NOTE:
   When a Call Slip Dæmon session is ended/exited, the **History** tab is cleared for the next call slip processing session. **Unprocess** works only during a current session.

5. (Optional) Link an item to the call slip request.

   Result: If a request that is not linked to an item is processed, the **Link Item** dialog box displays. See Link Item to Request on page 3-10 for more information.

   The **Link Item** dialog box also displays anytime an attempt is made to process and fill a call slip request if the **Force Item Search on Process** check box in Preferences is checked. See Preferences on page 4-1 for more information about the **Force Item Search on Process** check box.

Also, if a call slip request is linked to an existing item that does not have a barcode, a barcode can be added to the item before processing the call slip request. See Adding a Barcode to a Requested Item on page 3-14 for more information.

Link Item to Request

Your library may allow patrons in OPAC to submit call slip requests that are not linked to existing items. For those requests to be filled in Call Slip Dæmon, they must be linked to an existing item or to a new item that is created. This capability is available with Call Slip Dæmon.

Additionally, Call Slip Dæmon allows one to change the item to which any call slip request is linked. Perhaps staff needs to link a different copy of the item to the call slip request. Call Slip Dæmon allows one to override the item that is associated with a request and link a different item to the request.

The **Link Item** dialog box (see Figure 3-6) displays in the following situations.

- **Link Item to Request** from the **Edit** menu is selected.
- **Ctrl+L** is entered.
- An attempt is made to fill a request that is not linked to an item.

NOTE:
The **Link Item** dialog box also displays when the **Force Item Search on Process** check box is checked in Preferences and an attempt is made to process and fill a call slip request.

The procedure for linking an existing item to a Call Slip request is shown in Procedure 3-7, Linking Existing Item to Call Slip Request, on page 3-10.

Procedure 3-7. Linking Existing Item to Call Slip Request

Use the following to link an item to a call slip request.

1. Select the call slip request that you want to link to an item on the **Pending** tab.

   Result: This highlights the request to be processed.

2. Select **Link Item to Request** from the **Edit** menu, press **Ctrl+L**, or right-click the mouse on the call slip request and select **Link Item to Request**.

Result: The **Link Item** dialog box displays. See Figure 3-6.

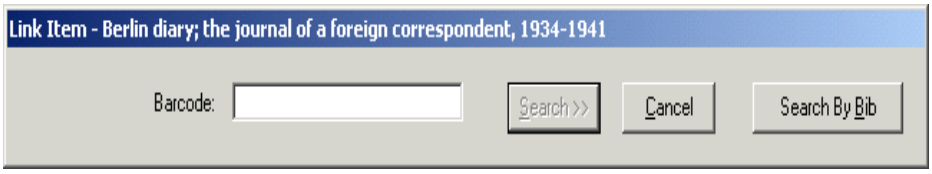

Figure 3-6. Call Slip Dæmon Link Item Dialog Box

3. Enter or scan the barcode of the item to link to the call slip request in the **Barcode** field.

   (Or click **Search By Bib** and follow the steps in Procedure 3-10, Select Another Item, on page 3-17.)

   Result: This identifies the item to link to the pending request.

   NOTE:
   If the barcode entered is the same as the barcode associated with the request, the request processes automatically and moves to the **History** tab.

4. Click the **Search** button

   Result: The **Link Item** dialog box expands to include a search results box. See Figure 3-7.

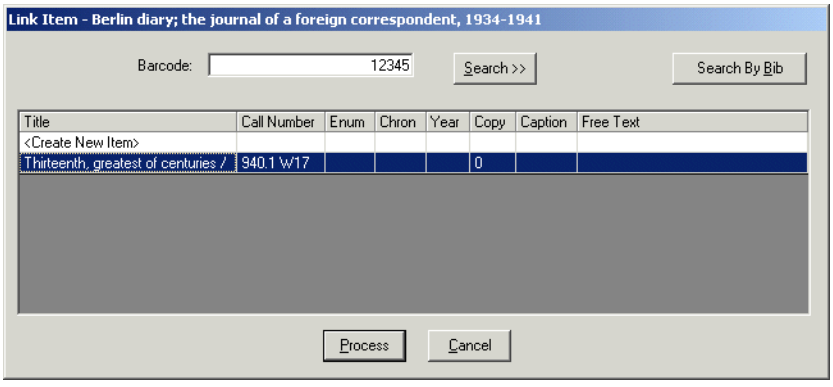

Figure 3-7. Call Slip Dæmon Link Item Dialog Box Expanded

If the barcode that is entered is associated with any items, the titles of those items display in the search results box. The **<Create New Item>** command also displays in the search results box. This command may display differently as a result of local customizing. NewItem= Variable on page 4-17 for more information.

If the barcode that is entered is not associated with any existing items, only the **<Create New Item>** command displays in the search results box.

5. Click one of the existing items.

   (Or click **Search By Bib** and follow the steps in Procedure 3-10, Select Another Item, on page 3-17.)

   Result: This highlights a specific item to be selected for the pending call slip request.

6. Click **Process**.

   Result: The call slip request is linked and transferred from the **Pending** tab to the **History** tab.

   Call slip requests processed during the call slip session remain on the **History** tab until the end of the call slip session.

NOTE:
You can unprocess a call slip request by selecting the request on the **History** tab and clicking the **Unprocess** button. If an existing item is linked to a call slip request, unprocessing the call slip request unlinks the call slip request and returns the call slip request to the **Pending** tab in its original state.

The procedure for creating a new item link to a Call Slip request is shown in Procedure 3-8, Creating a New Item to Link to a Call Slip Request, on page 3-12.

Procedure 3-8. Creating a New Item to Link to a Call Slip Request

Use the following to create a new item to link to a call slip request.

1. Select the call slip request that you want to link to an item on the **Pending** tab.

   Result: This highlights the request to be processed.

2. Select **Link Item to Request** from the **Edit** menu, press **Ctrl+L**, or right-click the call slip request; and select **Link Item to Request**.

   Result: The **Link Item** dialog box displays. See Figure 3-6.

3. Enter or scan the barcode of the item to link to the call slip request in the **Barcode** field.

   Result: This identifies the item to link to the pending call slip request.

4. Click the **Search** button

   Result: The **Link Item** dialog box expands to include a search results box. See Figure 3-7.

5. Click **<Create New Item>** in the search results box.

   Result: This provides the layout for entering new items to be linked.

6. Click **Process**.

   Result: The newly created item is linked to the pending call slip request.

   NOTE:
   It is possible to create a new item with a duplicate barcode. The new item created has the same barcode as the one displayed on the expanded **Link Item** dialog box. If existing items are displayed on the **Link Item** dialog box and **<Create New Item>** is selected, the newly-created item receives the same barcode as the other items. There is no warning if the new item created has the same barcode as existing items.

7. (Optional) Click **Yes** or **No** to respond to a verification message. The verification message only displays if the **Verify Create New Item or Add Barcode** process option is selected in **Preferences**. See Figure 3-8.

Figure 3-8. Verification Message for Create New Item

Result: The call slip request is transferred from the **Pending** tab to the **History** tab.

The call slip requests processed during the call slip session remain on the **History** tab until the end of the call slip session.

NOTE:
One can unprocess a call slip request by selecting the request on the **History** tab and clicking the **Unprocess** button. If a new item record is created and linked to a call slip request, unprocessing that call slip request unlinks the call slip request from the newly-created item, deletes the newly-created item, and returns the call slip request to the **Pending** tab in its original state.

It is possible for a call slip request to be linked to an existing item that does not have a barcode. Call Slip Dæmon allows one to add a barcode to an item before processing the call slip request.

The procedure for adding a barcode to a requested item is shown in Procedure 3-9, Adding a Barcode to a Requested Item, on page 3-14.

Procedure 3-9. Adding a Barcode to a Requested Item

Use the following to add a barcode to a requested item that does not have a barcode.

1. Select the call slip request on the **Pending** tab.

   Result: This highlights the request and makes it active.

2. Select **Link Item to Request** from the **Edit** menu, press **Ctrl+L**, or right-click the call slip request; and select **Link Item to Request**.

   Result: The **Link Item** dialog box displays. See Figure 3-6.

3. Enter or scan the barcode to be added into the **Barcode** field.

   Result: This identifies the barcode to be added.

4. Click the **Search** button.

   Result: The **Link Item** dialog box expands to include a search results box, and the **<Add Barcode to Item>** command displays. See Figure 3-9. This command may display differently as a result of local customizing. See AddBarcode= Variable on page 4-18 for more information.

   If the barcode entered is associated with any items, the titles of those items also display in the search results box.

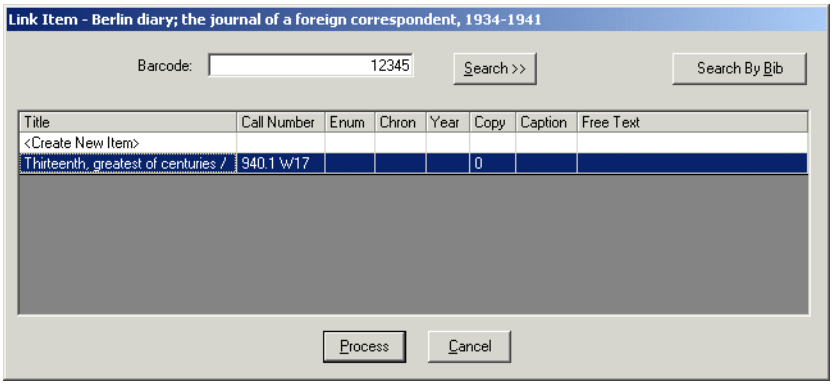

Figure 3-9. Call Slip Dæmon Link Item Dialog Box - Expanded

5. Click the **<Add Barcode to Item>** command.

   Result: This identifies that the barcode is to be added to the item.

6. Click the **Process** button.

   Result: The barcode is added to the linked item. The call slip request is processed and transferred from the **Pending** tab to the **History** tab.

7. (Optional) Click **Yes** or **No** to respond to a verification message. The verification message only displays if the **Verify Create New Item or Add Barcode** process option is selected in **Preferences**.

   Result: This steps confirms or cancels the request to add a barcode.

NOTE:
One can unprocess a call slip request by selecting the request on the **History** tab and clicking the **Unprocess** button. Unprocessing a call slip request that contains a newly-added barcode deletes the barcode from the linked item and returns the call slip request to the **Pending** tab in its original state.

The call slip requests processed during the call slip session remain on the **History** tab until the end of the call slip session.

Select Another Item

The Call Slip module provides the option for the Call Slip operator to select another item for an existing call slip request. See Figure 3-10.

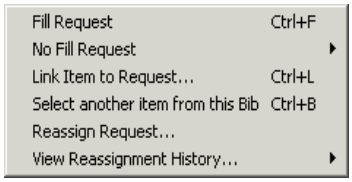

Figure 3-10. Select another item (Edit menu)

The Call Slip operator may choose to select another item attached to the same bibliographic record or may select an item attached to an entirely different bibliographic record.

This feature displays a list of all items attached to the bibliographic record with which the call slip request is associated.

The procedure for selecting another item is shown in Procedure 3-10, Select Another Item, on page 3-17.

Procedure 3-10. Select Another Item

Use the following to select another item for a pending request.

1. Highlight the pending call slip request to which you want to select another item.

   Result: The call slip request to which a new item is to be attached is identified.

2. Click **Edit** (or right click highlighted request).

   Result: This displays the **Edit** options.

3. Click **Select another item from this Bib**.

   Result: The **Link Item** dialog box for **Select another item from this Bib** displays. See Figure 3-11.

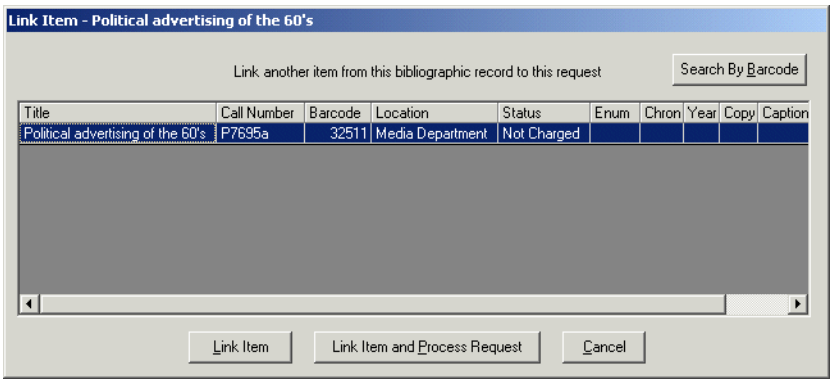

Figure 3-11. Link Item dialog box for Select another item from this Bib

NOTE:
If there are no additional items associated with the bibliographic record for the call slip request, an information message displays. See Figure 3-12.

Figure 3-12. No Other Items for Bib informational message

4. Click the item record to be selected from the list.

   Result: This highlights the item to be linked.

5. (Optional) Click **Search by Barcode** to identify a different bibliographic record and item to select for the call slip request and complete the item linking using Procedure 3-7, Linking Existing Item to Call Slip Request, on page 3-10.

   Result: This displays the **Link Item** dialog box as seen in Figure 3-6.

6. Click **Link Item and Process Request**, click **Link Item**, or click **Cancel**.

   Result: The substitute item is linked to the request and processed, simply linked and displayed on the **Pending** tab, or the transaction is cancelled.

TIP:
Double-click the item to link and fulfill the request in one step.

Reassign Request

The Call Slip Reassign Request feature permits staff using Call Slip Dæmon to direct a call slip request to another Call Slip queue before the request has been processed. This option exists for call slip requests with or without items linked to it.

Once reassigned, the call slip displays in the new queue specified by the Call Slip Dæmon operator and is automatically removed from the reassigning queue.

After a call slip is reassigned, the status of the Call Slip request that displays in the Circulation module and the WebVoyáge module is Reassigned. The Reassigned status behaves the same as the Accepted status.

The procedure for reassigning call slip requests is shown in Procedure 3-11, Call Slip Request Reassignment.

Procedure 3-11. Call Slip Request Reassignment

Use the following to reassign a pending call slip request.

1. Highlight the pending call slip request to be reassigned.

   Result: The call slip request to be reassigned is identified.

2. Click **Edit** (or right click highlighted request).

   Result: This displays the **Edit** options that include the **Reassign Request** option.

   NOTE:
   Reassign Request is an active option for individual call slip requests. When you highlight multiple call slip requests, this option is not available.

3. Click **Reassign Request**.

   Result: A list of Call Slip queues displays.

4. Select the **Reassignment Queue**, and click **OK** or **Cancel**.

   Result: The call slip request is reassigned to the new Call Slip Queue or the operation is cancelled.

   When reassigned, the call slip request displays in the reassigned queue with the note **(REASSIGNED)**. See Figure 3-13.

Figure 3-13. Call Slip Reassigned Status Message

IMPORTANT:
Once a call slip request is reassigned, this action cannot be unprocessed as with other requests that display on the History tab. A reassignment action immediately transfers a call slip request to the specified queue, and it does not display on the History tab of the reassigning queue.

NOTE:
If a call slip is reassigned to a Call Slip queue that is set to automatically print call slips, the **(REASSIGNED)** status is immediately replaced with the printed status.

Call Slip Reassignment History

The system tracks the history of call slip requests that are reassigned and provides the ability to print and view this reassignment information. The benefit of tracking this information is to avoid reassigning a call slip request to a queue where it has already been.

The procedure for viewing call slip reassignment history is shown in Procedure 3-12, View Call Slip Reassignment History.

Procedure 3-12. View Call Slip Reassignment History

Use the following to view call slip reassignment history.

1. Highlight the pending call slip request whose history you want to view.

   Result: The call slip request whose history is to be viewed is identified.

2. Click **Edit**.

   Result: This displays the **Edit** options that include the **View Reassignment History** option. See Figure 3-10.

   NOTE:
   View Reassignment History is an active option for individual call slip requests. When you highlight multiple call slip requests, this option is not active.

3. Click **View Reassignment History**.

Result: The history for the selected call slip request displays. (The history displays in reverse chronological order.) See Figure 3-14.

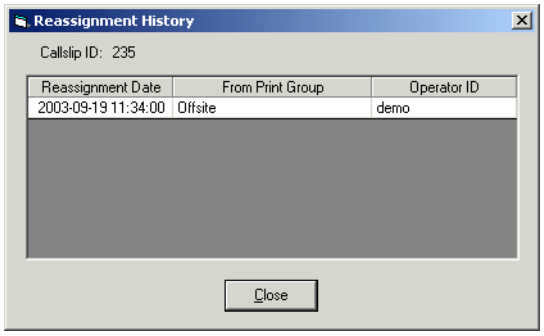

Figure 3-14. View Reassignment History dialog box

NOTE:
If there is no reassignment history, the system displays **No History Items Found**.

4. Click **OK**.

   Result: This closes the open history dialog box.

Displaying Processed Requests (History Tab)

From the **History tab**, you can do the following.

- View the list of call slip requests that have been processed during the current Call Slip Dæmon session
- Unprocess call slip requests that have been processed during the current Call Slip Dæmon session

View the List of Processed Call Slip Requests

To view the list of call slip requests that you have processed during your current call slip session, click the **History** tab. The **History** tab displays the Request ID number and Request Action such as Filled, Not Filled, or Error of each processed

call slip request. The processed requests remain on the **History** tab until the Call Slip Dæmon session is ended by exiting Call Slip Dæmon or until the request(s) is unprocessed.

There are numerous reasons why one may want to unprocess a call slip request that is processed during the current Call Slip Dæmon session. For example, the wrong call slip request may have been processed, a request may have been processed with the wrong Fill Reason, or a call slip request may have been linked to the wrong item.

Procedure 3-13. Unprocessing a Processed Call Slip Request

Use the following to unprocess a call slip request.

1. Click the **History** tab.

   Result: The processed call slip requests display.

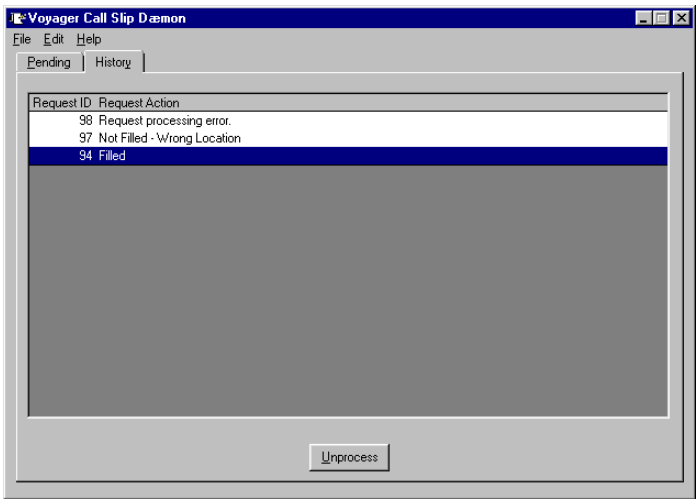

Figure 3-15. Call Slip Dæmon History tab

2. Click the processed call slip request that needs to be unprocessed.

   Result: This identifies the call slip request to be unprocessed.

NOTE:
The **Unprocess** button is enabled only if one of the processed call slip requests is highlighted on the **History** tab.

3. Click the **Unprocess** button.

   Result: This deletes the request from the **History** tab and transfers the request back to the **Pending** tab.

NOTE:
If you linked an existing item to a call slip request, unprocessing the call slip request unlinks the call slip request and returns that call slip request to the **Pending** tab in its original state.

If you have created a new item record and linked it to a call slip request, unprocessing that call slip request unlinks the call slip request from the newly-created item, deletes the newly-created item, and returns the call slip request to the **Pending** tab in its original state.

If you added a barcode to an item that was linked to a call slip request, unprocessing the call slip request deletes the newly-created barcode from the linked item and returns the call slip request to the **Pending** tab in its original state.

See Link Item to Request on page 3-10 for more information about linked items.

Customizing Your System

4

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Customizing Your System

4

Overview

Voyager Call Slip Dæmon provides many options to tailor the system to your needs. This tailoring is handled through the Preferences function located in the **File** menu and through the options specified in the `callslip.ini` file. The following sections describe in detail the options available and how to customize them to meet your requirements.

Preferences

You can define preferences for Call Slip Dæmon by selecting **Preferences** from the **File** menu to display the **Preferences** dialog box. See Figure 4-1. In the **Preferences** dialog box, you can specify the following.

- Select automatic Call Slip Dæmon features
- Define how automatic features are to perform
- Define how certain aspects of Call Slip Dæmon display
- Define certain print options with which a call slip request is printed

The following options in the **Preferences** dialog box automatically update the `[Preferences]` stanza of the `callslip.ini` file.

- Update and Email Send Interval (1-99 minutes)
- Use alert sound

- Automatically print new requests
- Sort Pending Requests by
- Default Find Method

Additionally, the **Printer Options** information in the **Preferences** dialog box automatically updates the `[Print Options]` stanza of the `callslip.ini` file.

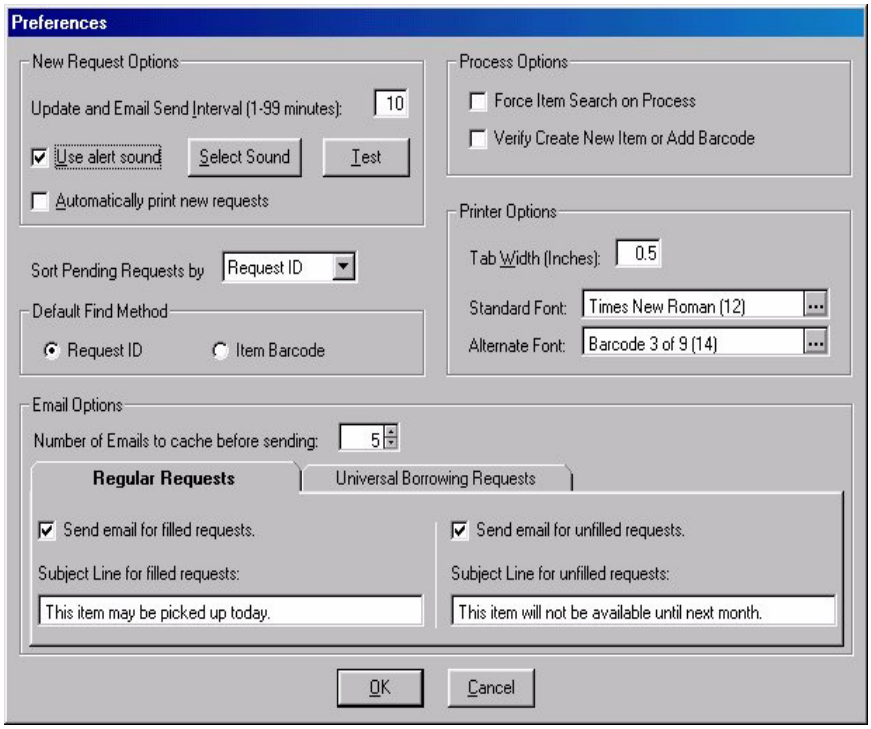

Figure 4-1. Call Slip Dæmon Preferences dialog box

New Request Options

Under New Request Options, you can specify the following.

- The frequency with which the system automatically updates the **Pending** tab
- The use of an audio alert for new pending call slip requests received
- The automatic printout of new call slip requests

Update and Email Send Interval

Use the **Update and Email Send Interval** to specify the number of minutes from 1 to 99 that elapses before the Call Slip Dæmon polls the server for new call slip requests and checks the queue for emails to be sent. When the **Update and Send Email Interval** elapses, the server is automatically queried for new pending call slip requests and checked for new emails to distribute. Subsequently, a list of all new pending call slip requests is returned to the **Pending** tab, and email messages are sent.

The setting for this option depends on the number of requests you process and your procedures. If your library retrieves requests one at a time as they are received, the interval specified should be short so that individual requests display sooner. If you retrieve requests in a batch the interval does not need to be as short.

NOTE:
The **Update and Send Email Interval** option works in conjunction with the **Number of Emails to cache before sending** option. See Email Options on page 4-6. Email messages are sent when *one* of these parameters is met.

Use Alert Sound

Use the **Use alert sound** to specify if an audio signal is to be used to notify staff when new call slip requests are placed on the **Pending** tab. After the **Use alert sound** check box is selected, use the **Select Sound** button to specify the location of the audio file to be used. To confirm the options specified, use the **Test** button to test the audio file selected.

Automatically Print New Requests

Use the **Automatically print new requests** option to have Call Slip Dæmon automatically print new pending call slip requests as they are sent to the **Pending** tab.

Sort Pending Requests by

Use the **Sort Pending Requests by** option, to determine the sort order of the call slip requests on the **Pending** tab. The available sort choices are as follows:

- Request ID
- Call Number
- Title

Select the sort order that best matches your requirements. You may want to set the sort order to match your shelf order if call slip requests are processed in batches.

Default Find Method

Use the **Default Find Method** option to enhance the workflow processing of call slip requests. This option determines the default cursor placement in the **Find Request ID** field or the **Find Item Barcode** field on the **Pending** tab. Select the most common search type as the default, by **Request ID** or by **Item Barcode**.

Process Options

Preferences provides two **Process Options**.

- **Force Item Search on Process**
- **Verify Create New Item or Add Barcode**

Force Item Search on Process

Use the **Force Item Search on Process** option to add a verification step to the call slip processing procedure. When this option is selected, Call Slip Dæmon displays the **Link Item** dialog box after the call slip operator has selected a request and clicks **Process**. This forces the call slip operator to enter a barcode in order to complete processing of the request. This additional step ensures that the call slip operator is processing the correct request with the correct item.

If the barcode entered on the **Link Item** dialog box matches the barcode tied to the call slip request, the request processes and is automatically moved to the **History** tab when the **Search** button is clicked.

NOTE:
When the **Force Item Search on Process** option is not selected, the **Link Item** dialog box functions somewhat differently. After you enter the barcode and click the **Search** button, the expanded **Link Item** dialog box displays. Processing of the call slip request is not yet complete.

If the barcode that the call slip operator types or scans on the **Link Item** dialog box is not the same as the barcode tied to the call slip request, the expanded **Link Item** dialog box displays enabling the operator to use the Link Item functions to continue processing the call slip request. See Link Item to Request on page 3-10 for additional information.

Verify Create New Item or Add Barcode

Use the **Verify Create New Item or Add Barcode** option to force a verification message to display when a call slip operator attempts to create a new item or add a barcode to an existing item from the **Link Item** dialog box. See Figure 3-8 on page 3-14.

If this option is not selected, a verification message will not display when a call slip operator attempts to create a new item or add a barcode to an existing item from the **Link Item** dialog box.

See Creating a New Item to Link to a Call Slip Request on page 3-12, and see Adding a Barcode to a Requested Item on page 3-14 for additional information.

Printer Options

There are three **Printer Options**.

- **Tab Width**
- **Standard Font**
- **Alternate Font**

Tab Width

The **Tab Width** option sets the spacing, in inches, for the tab command used in the `[Print Template]` stanza of the `callslip.ini` file.

Standard Font

Use the **Standard Font** option to select the standard font that is used to print call slips. Click the ellipsis to display font choices from which to select.

Alternate Font

Use the **Alternate Font** option to select an alternate font to be used to print call slips. Click the ellipsis to display font choices from which to select. As in Figure 4-1, an alternate font, Barcode 3 of 9 for example, can be selected to print barcode information on the call slip request printout.

The call slip operator can use the printed barcode on the call slip request printout to scan the barcode into the **Find Item Barcode** field on the **Pending** tab. This will aid in more quickly processing call slip requests. See Figure 4-7 on page 4-31 for an example of a barcode printed on a call slip request printout.

To learn more about using the alternate font in the call slip print template in the `[Print Template]` stanza of the `callslip.ini` file, see Defining the Callslip.ini File on page 4-7.

Email Options

Use the **Number of Emails to cache before sending** option within **Email Options** to group the distribution of emails into a batch to be sent at one time. Email messages to be sent queue in cache until the number specified in this option is reached. When the setting is 0 (zero), each email is sent as it is created. The maximum setting for **Number of Emails to cache before sending** is 100. Any email messages remaining in cache are sent when Call Slip Dæmon is exited.

NOTE:
The **Number of Emails to cache before sending** option works in conjuction with the **Update and Send Email Interval** option (see Update and Email Send Interval on page 4-3).

⚠ **IMPORTANT:**
Email messages are sent when one of these parameters (Number of Emails to cache before sending option or Update and Send Email Interval option) is met.

Regular Requests

Use the options on the **Regular Requests** tab to indicate when email requests are to be sent and specify the content of the email subject line for call slip requests in a regular (non-Universal Borrowing) environment.

Select **Send email for filled requests** and/or **Send email for unfilled requests** to specify if emails are to be sent for filled requests and/or unfilled requests. Enter the subject line content up to 80 characters in length for each email type, filled or unfilled, that you choose to send.

Universal Borrowing Requests

Use the options on the **Universal Borrowing Requests** tab to indicate when email requests are to be sent and specify the content of the email subject line for call slip requests in a Universal Borrowing environment.

Select **Send email for filled requests** and/or **Send email for unfilled requests** to specify if emails are to be sent for filled requests and/or unfilled requests. Enter the subject line content up to 80 characters in length for each email type, filled or unfilled, that you choose to send.

Save Preferences

Click the **OK** button to save the selections you have made and close the Preferences dialog box.

Click the **Cancel** button to close the Preferences dialog box without saving.

Defining the Callslip.ini File

Upon installation, the Voyager Call Slip Dæmon initialization file is located in the `.../Voyager/misc` directory. Your library may have customized the name of the main directory under which Voyager resides.

The `callslip.ini` file contains the following stanzas.

- `[General]`
- `[Preferences]`
- `[Print Options]`
- `[Routing Slip Print Template]`
- `[Call Slip Print Template]`
- `[Email Options]`
- `[Email Template Filled]`
- `[Email Template UnFilled]`
- `[Email Template UB Filled]`
- `[Email Template UB UnFilled]`

The `[Preferences]` and `[Print Options]` stanzas do not need to be configured from within the `callslip.ini` file. These stanzas directly reflect configuration selections that are made from the **File>Preferences** menu options in Call Slip Dæmon.

The information generated from the `[Call Slip Print Template]` stanza can be printed and used as a pull slip for patron requests.

The following stanzas determine the content and format of information printed as a result of processing call slip requests in Call Slip Dæmon.

- [Routing Slip Print Template]
- [Call Slip Print Template]
- [Email Template Filled]
- [Email Template UnFilled]
- [Email Template UB Filled]
- [Email Template UB UnFilled]

Callslip.ini File Example

Figure 4-2 is an example of the `callslip.ini` file.

```
Line#
 1   [General]
 2   LocationCode=
 3   NewItem=<Create New Item>
 4   AddBarcode=<Add Barcode to Item>
 5
 6   [Preferences]
 7   Alert=1
 8   AutoPrint=0
 9   SortPending=R
 10  DefaultFind=0
 11  Interval=10
 12  ForceSearch=0
 13  VerifyNewAdd=0
 14  Sound=
 15
 16  [Print Options]
 17  FontName=Times New Roman
 18  FontSize=12
 19  TabWidth=0.5
 20  AlternateFontName=Barcode 3 of 9
 21  AlternateFontSize=14
 22
 23  [Routing Slip Print Template]
 24  Route Item To:
 25  \
 26  \
 27  Library:   \F600
 28  Location:  \F601
 29  Address:   \F602
 30  \F603
 31  \F604
```

Figure 4-2. Callslip.ini file example

```
Line#
 32  \F605
 33  \F606
 34  \F607, \F608 \F609
 35  \F610
 36
 37
 38  [Call Slip Print Template]
 39  Patron Barcode:\T\A*\F525*\a
 40  \
 41  \
 42  \
 43  Call Number:\T\F301
 44  Author:\T\F203
 45  Title:\T\F202
 46  Location:\T\F411
 47  Patron Name:\T\F509
 48  Enumeration:\T\F409
 49  Request date:\T\F102
 50  Pickup Location:\T\F105
 51  \
 52  Promote Request History:
 53  \F530:(Date=Promote Date:,Database=Database
     Name:,Cluster=Cluster Name:)
 54  \
 55  \
 56  Reassignment History:
 57  \F540:(Date=Date,From=From Print
     Group,By=Operator)
 58  \
 59  Reply to Reader:          Item is not
     available...
 60  \F901
 61  \
```

Figure 4-2. Callslip.ini file example

```
Line#
  62  \
  63  \A\F101\a
  64  \
  65  \
  66  \
  67  (Request number)
  68  \
  69  \S24\F509\s
  70
  71  [Email Options]
  72  CacheCount=5
  73  RegFilledActive=Y
  74  RegFilledSubject=This item may be picked up
      today.
  75  RegUnFilledActive=Y
  76  RegUnFilledSubject=This item will not be
      available until next month.
  77  UBFilledActive=Y
  78  UBFilledSubject=This item may be picked up
      in 3 days.
  79  UBUnFilledActive=Y
  80  UBUnFilledSubject=This Item is no longer
      available.
  81
  82
  83  [Email Template Filled]
  84  \
  85  Dear: \F509
  86  \
  87  The Item you requested has been retrieved
      and is now available.\
  88  \
  89  Call Number: \F301
  90  Author: \F203
```

Figure 4-2. Callslip.ini file example

```
Line#
  91  Title: \F202
  92  Location: \F411
  93  Enumeration: \F409
  94  Request date: \F102
  95  \
  96  \
  97  Note from the Library:\
  98  \F110
  99  \
 100  If you need to reply to this message, reply
      to: xxx@yyy.zzz\
 101  \
 102  \
 103  \
 104  (Request number)\
 105  \
 106  \F101
 107  \
 108
 109  [Email Template UnFilled]
 110  \
 111  Dear: \F509
 112  \
 113  The Item you requested is not available.\
 114  \
 115  Reason: \F900
 116  \
 117  Call Number: \F301
 118  Author: \F203
 119  Title: \F202
 120  Location: \F411
 121  Enumeration: \F409
 122  Request date: \F102
```

Figure 4-2. Callslip.ini file example

```
Line#
  123 \
  124 \
  125 Note from the Library:
  126 \F110
  127 \
  128 If you need to reply to this message, reply
      to: xxx@yyy.zzz\
  129 \
  130 \
  131 \
  132 (Request number)\
  133 \
  134 \F101
  135 \
  136
  137
  138 [Email Template UB Filled]
  139 \
  140 Dear: \F509
  141 \
  142 The Item you requested from another library
      has been retrieved and is now in transit.\
  143 \
  144 Call Number: \F301
  145 Author: \F203
  146 Title: \F202
  147 Location: \F411
  148 Enumeration: \F409
  149 Request date: \F102
  150 \
  151 \
  152 Note from the Library:\
  153 \F110
```

Figure 4-2. Callslip.ini file example

```
Line#
  154 \
  155 If you need to reply to this message, reply
      to: xxx@yyy.zzz\
  156 \
  157 \
  158 \
  159 (Request number)\
  160 \
  161 \F101
  162 \
  163
  164 [Email Template UB UnFilled]
  165 \
  166 Dear: \F509
  167 \
  168 The Item you requested from another library
      is not available.\
  169 \
  170 Reason: \F900
  171 \
  172 Call Number: \F301
  173 Author: \F203
  174 Title: \F202
  175 Location: \F411
  176 Enumeration: \F409
  177 Request date: \F102
  178 \
  179 \
  180 Note from the Library:\
  181 \F110
  182 \
  183 If you need to reply to this message, reply
      to: xxx@yyy.zzz\
```

Figure 4-2. Callslip.ini file example

```
Line#
  184 \
  185 \
  186 \
  187 (Request number)\
  188 \
  189 \F101
  190 \
```

Figure 4-2. Callslip.ini file example

General Stanza

The `[General]` stanza stores the location code and the label content for the new item and add barcode commands. See lines 1 through 4 in Figure 4-2. The following information provides a detailed description of the variables in the `[General]` stanza.

LocationCode= Variable

The first time Voyager Call Slip Dæmon is accessed a dialog box listing the call slip groups created in Voyager System Administration displays. See Figure 1-3 on page 1-4. When the appropriate call slip group is selected, the group name is saved in the `LocationCode=` variable in the `[General]` stanza of the `callslip.ini` file.

Storing the `LocationCode=` variable in `callslip.ini` conveniently saves the call slip operator an extra step at login. However, if the call slip group needs to be changed for a particular workstation, simply delete the variable specified after `LocationCode=` in the `callslip.ini` file stored on that workstation. The next time Voyager Call Slip Dæmon is run on that workstation the Select Call Slip Group dialog box displays the list of call slip groups as defined in Voyager System Administration from which to select.

NOTE:
The `LocationCode=` variable can be entered manually. However, allowing the system to store the variable avoids any possible errors that may occur by doing it manually. Entering incorrect information in the `LocationCode=` variable causes Voyager Call Slip Dæmon to fail to run.

The following approach is recommended if the call slip group needs to be selected each time Voyager Call Slip Dæmon is run.

- Delete the value that is entered for the `LocationCode=` variable in the `[General]` stanza of the `callslip.ini` file and save the file.
- Set the `callslip.ini` file to read-only.

This causes the **Call Slip Group** dialog box to display for each login session. This is a useful technique to use if you plan to use a single workstation for processing call slip requests for multiple call slip groups.

NOTE:
Each time Voyager Call Slip Dæmon is run, call slip **Preferences** resets to the options specified in the read-only version of `callslip.ini`.

Procedure 4-1. Saving Callslip.ini As Read-Only

Use the following to save the `callslip.ini` file as read-only.

1. Right-click the `callslip.ini` file.

   Result: The **File** menu displays.

   NOTE:
   Upon installation, the `callslip.ini` file is located in the `.../Voyager/misc/` directory. Your library may have customized the name of the main directory under which Voyager resides. Check with your system administrator for your location's directory path structure.

2. Select **Properties** from the **File** menu.

   Result: The **callslip.ini Properties** dialog box displays.

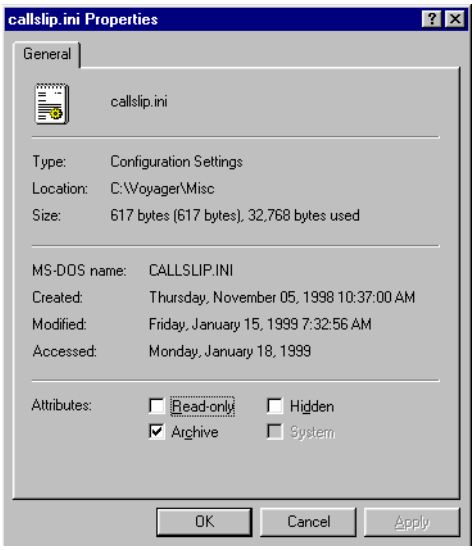

Figure 4-3. callslip.ini Properties dialog box

3. Select the **Read-only** option, and click **Apply**.

   Result: This sets the file to read-only mode.

4. Click **Close** to exit the **callslip.ini Properties** dialog box.

   Result: This saves the selection and closes the dialog box.

NewItem= Variable

The `NewItem=` variable provides the text that displays in the expanded **Link Item** dialog box for the command that creates new items. `Callslip.ini` has a default setting of `NewItem=<Create New Item>`. See Figure 4-4 for an example of how this displays on the expanded **Link Item** dialog box. For another example, see Figure 3-7.

NOTE:
If nothing is entered for the `NewItem=` variable, the create new item command displays a blank line in the expanded **Link Item** dialog box. See Creating a New Item to Link to a Call Slip Request on page 3-12 for more information.

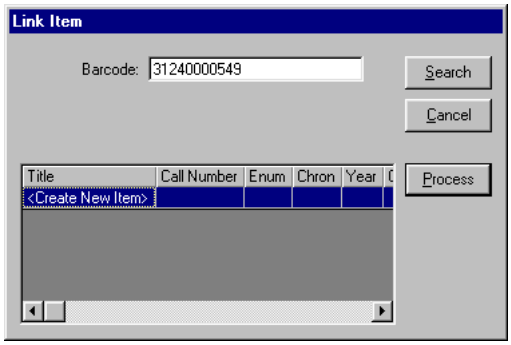

Figure 4-4. Link Item dialog box - Create New Item command displayed

AddBarcode= Variable

The `AddBarcode=` variable provides the text that displays in the expanded **Link Item** dialog box for the command that creates new barcodes. `Callslip.ini` has a default setting of `AddBarcode=<Add Barcode to Item>`. See Figure 4-5 for an example of how this displays on the expanded **Link Item** dialog box. For another example, see Figure 3-9.

NOTE:
If nothing is entered for the `AddBarcode=` variable, the add barcode to item command displays a blank line in the expanded **Link Item** dialog box. See Adding a Barcode to a Requested Item on page 3-14 for more information.

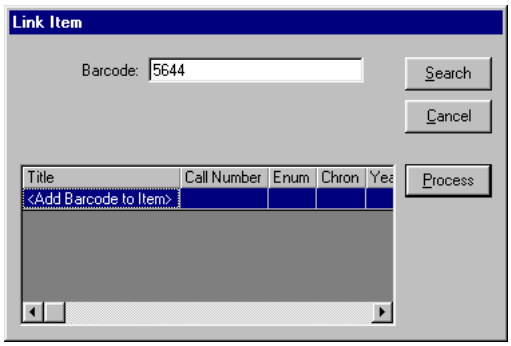

Figure 4-5. Link Item dialog box - Add Barcode command displayed

Preferences Stanza

The [Preferences] stanza of the callslip.ini file directly reflects the choices made in the **Preferences** dialog box in Voyager Call Slip Dæmon. This information is automatically saved in the callslip.ini file when it is changed in Voyager Call Slip Dæmon. The [Preferences] stanza can be manually edited. However, you may find it more expedient to use the **Preferences** dialog box in Voyager Call Slip Dæmon instead, and let the system automatically save the information to the callslip.ini file.

Print Options Stanza

The [Print Options] stanza of the callslip.ini file directly reflects the choices made in the **Print Options** group box on the **Preferences** dialog box in Voyager Call Slip Dæmon. This information is automatically saved in the callslip.ini file when it is changed in Voyager Call Slip Dæmon. The [Print Options] stanza can be manually edited. However, you may find it more expedient to use the **Print Options** group box on the **Preferences** dialog box in Voyager Call Slip Dæmon instead, and let the system automatically save the information to the callslip.ini file.

NOTE:
The [Print Options] stanza contains specifications that are used by the template stanzas that provide printed output.

Email Options Stanza

The [Email Options] stanza of the callslip.ini file directly reflects the choices made in the **Preferences** dialog box in Voyager Call Slip Dæmon. This stanza stores the selections that specify the following.

- Is email to be sent Yes (Y) or No (N)
- Content of the email subject line
- Number of emails to queue before sending (cache count)

This information is automatically saved in the callslip.ini file when it is changed in Voyager Call Slip Dæmon. The [Email Options] stanza can be manually edited. However, you may find it more expedient to use the **Preferences** dialog box in Voyager Call Slip Dæmon instead, and let the system automatically save the information to the callslip.ini file.

Template Stanzas

The template stanzas define the output for a variety of requirements. The setup of the following template stanzas share some common features.

- `[Routing Slip Print Template]`
- `[Call Slip Print Template]`
- `[Email Template Filled]`
- `[Email Template UnFilled]`
- `[Email Template UB Filled]`
- `[Email Template UB UnFilled]`

In addition to the static content that is stored in the templates, there are also action codes and field codes that can be used to tailor the content of the template. See Callslip.ini File Example on page 4-8 for sample templates in the `callslip.ini` file.

When an operator selects **Print** from the **File** menu in Call Slip Dæmon, detailed information associated with the selected call slip request prints according to how the `[Print Template]` stanza of the `callslip.ini` file is set up. The print template can be completely customized. Whatever you type in the `[Print Template]` stanza appears on the call slip request printout. In addition, there are **action codes** that you can use in the `[Print Template]` stanza to change how the information displays on the printout, and certain **field codes** that you can enter after the **`\F`** action code to specify the field information that is to be printed.

Action Codes

Action codes are provided for formatting the output of the templates. Table 4-1 provides a list of action codes and a description of their functions.

Table 4-1. Action Codes

Action Code	Description
\	Prints a blank line.
\A	Starts alternate font (as specified in the Preferences dialog box).
\a	Ends alternate font.
\B	Starts bold.
\b	Ends bold.
\I	Starts italic.

Table 4-1. Action Codes

Action Code	Description
\i	Ends italic.
\U	Starts underline.
\u	Ends underline.
\S	Starts new font size (a two-digit size must follow \S).
\s	Ends new font size.
\T	Inserts a tab.
\F	Inserts field data (a three-digit field code must follow \F).

See Figure 4-6 on page 4-30 for an example of how to implement action codes.

Printed information prints using the font and font size specified in the Standard Font field on the Preferences dialog box in Voyager Call Slip Dæmon.

Field Codes

Field codes identify the information in the templates that is to be output for emails, call slip printouts, and routing information. Field codes work in combination with the **\F** action code to produce the desired result.

In addition to the predefined field codes, any MARC bibliographic field and subfields (with the exception of control fields 001 - 009) can be printed. See MARC Variable Data on page 4-23 for more information.

Table 4-2 provides a list of predefined field codes and a description of the field content.

Table 4-2. Predefined Field Codes

Field Code	Description
100	Call Slip Print Group (Queue)
101	Request ID
102	Request Date & Time
105	Pickup Locations for local call slip requests **NOTE:** If 105 in a Universal Borrowing situation is used for a call slip request with a pickup location at a remote database from the holding library, the pickup location is left blank.

Table 4-2. Predefined Field Codes

Field Code	Description
109	User Comment
110	Call Slip Reply Note
201	Title Brief
202	Title Long
203	Author
301	Call Number
401	Item Barcode
402	Enumeration
403	Chronology
404	Year
407	Copy Number
409	Copy Information (includes Enumeration, Chronology, Year, Caption, Free Text, and Copy Number all on one line)
411	Item Location
504	Patron Title
505	Patron SSN
506	Patron Institution ID
509	Formatted Name
510	Address Line 1
511	Address Line 2
512	Address Line 3
513	Address Line 4
514	Address Line 5
515	City
516	State/Province
517	Zip/Postal Code
518	Country
519	Phone Number
525	Patron Barcode
526	Patron Group Name

Table 4-2. Predefined Field Codes

Field Code	Description
530	Date (When), Database (Where), Cluster (Which) For History of UB (Universal Borrowing) Request Promotions
540	Date (When), From (Where), By (Who) For Call Slip Reassignment History
600	UB (Universal Borrowing) Library Name
601	UB (Universal Borrowing) Location Name
602	UB (Universal Borrowing) Address Line 1
603	UB (Universal Borrowing) Address Line 2
604	UB (Universal Borrowing) Address Line 3
605	UB (Universal Borrowing) Address Line 4
606	UB (Universal Borrowing) Address Line 5
607	UB (Universal Borrowing) Address City
608	UB (Universal Borrowing) Address State
609	UB (Universal Borrowing) Address Zip
610	UB (Universal Borrowing) Address Country
900	Call Slip No-Fill Reason
901	No-Fill Reason List

See Figure 4-6 on page 4-30 for an example of how to implement field codes.

MARC Variable Data

Any variable data from MARC bibliographic records can be identified in `callslip.ini` templates and printed (except for the MARC control fields 001-009). See Table 4-3 for a description of the syntax used with MARC variable data in `callslip.ini` templates.

This capability to use MARC variable data is provided in addition to the set of predefined data elements (see Table 4-2) and action codes (see Table 4-1) for use in `callslip.ini` templates.

NOTE:
There are a few predefined data elements such as Call Number, Author, and Year that can be generated using either method. That is, these duplicate predefined

codes can be used or the MARC variable data syntax can be used in a `callslip.ini` template to generate the same information on the call slip.

Table 4-3. Syntax for MARC variable data

Character Position	Character	Description
1 - 3	\MB	Action code to insert a MARC variable data field. \MB specifies that a data field is to be inserted into the print stream from a MARC bibliographic record.
4		Blank space.
5 - 7	ddd	Three-digit tag (010 - 999 defined by Endeavor) representing the MARC data field to be inserted into the print stream. **NOTE:** This excludes MARC control fields 001 - 009.
8		Blank space.
9	0 - 9, |, or X	Single digit representing the first MARC indicator for the field. Only insert the field into the print stream if the first indicator in the MARC field matches this value in the callslip.ini template. **NOTE:** A pipe symbol (|) in callslip.ini indicates that the field is only to be inserted into the print stream if the first indicator in the MARC field is blank. An X in the callslip.ini indicates that no comparison should be made with the first indicator in the MARC field. In this syntax, X acts as a wildcard character.
10	0 - 9, |, or X	Single digit representing the second MARC indicator for the field. Only insert the field into the print stream if the second indicator in the MARC field matches this value in the callslip.ini template. **NOTE:** A pipe symbol (|) in callslip.ini indicates that the field is only to be inserted into the print stream if the second indicator in the MARC field is blank. An X in the callslip.ini indicates that no comparison should be made with the first indicator in the MARC field. In this syntax, X acts as a wildcard character.

Table 4-3. Syntax for MARC variable data

Character Position	Character	Description
11		Blank space.
12..n	a - z and/or 0 - 9	String of 1 - 36 alphanumeric digits designating the MARC subfield(s) to be inserted into the print stream.
o - q	\m	Ends the action code.

The following is an example of what could be included in a `callslip.ini` template that represents the implementation of the syntax described in Table 4-3.

```
\MB 650 1X abcd\m
```

This example specifies the following to the system.

- Search for all instances of the 650 field that are present in the MARC record; and subsequently, reject any instances in which the first indicator is not equal to 1.
- The X is a wildcard character and indicates that the system is to ignore the second indicator value in the 650 fields.
- All instances of subfields a, b, c, and d are to be inserted into the print stream for each of the instances of the 650 field in which the first indicator is equal to 1.
- The action is terminated by \m.

Formatting the Data

The following are formatting considerations when using MARC variable data fields.

- Data from each instance of the MARC field are printed on separate lines.
- Strings of data from multiple subfields are concatenated with a separating space. If the group of concatenated data strings exceeds the available print area for a single line, the text is wrapped to the next line.
- Each line of text starts in the same column (position).
- Data from subfield 6 is printed exactly as contained in the MARC record. Any special handling indicated in the related 880 field to print alternate graphics is ignored.

Error Handling

The following are error-handling considerations when using MARC variable data fields.

- If there is no data in the variable data field specified as specified in the template, nothing is added to the print stream.
- If a control field 001 - 009 is designated in the callslip.ini template, the following text is inserted.

  *** Unsupported Field Code ***
- If a malformed action code is encountered in the callslip.ini template, the following text is inserted.

  *** Malformed MARC Field Code ***

Call Slip Reassignment History

To print call slip reassignment history, use the 540 field code in combination with the **\F** action code. This provides historical information for reassigned call slip requests.

Example:

```
\F540:(Date=Date,From=From Print Group,By=Operator)
```

This example highlights several key points.

- The colon and parentheses are required.
- Date, From, and By are the parameter names
- Each parameter must be followed by the equal sign (=)
- A character string of your choosing follows the equal sign for each parameter and is used as a column heading in the printed output.
- The first and second parameter/character string must end with a comma.
- (Optional) The parameters may be arranged in any order. They do not need to follow the sequence identified in the example.

Call Slip Promote History

To print call slip promote history, use the 530 field code in combination with the **\F** action code. This provides the history for Universal Borrowing request promotions.

Example:

```
\F530:(Date=Date,Database=Database Name,Cluster=Cluster
Name)
```

This example highlights several key points.

- The colon and parentheses are required.
- Date, Database, and Cluster are the parameter names.
- Each parameter must be followed by the equal sign (=).
- A character string of your choosing follows the equal sign for each parameter and is used as a column heading in the printed output.
- The first and second parameter/character string must end with a comma.
- (Optional) The parameters may be arranged in any order. They do not need to follow the sequence identified in the example.

Initiating and Ending Action Codes

All action codes begin with the backslash character. Many of the action codes work in pairs starting a function with the uppercase character and ending the function with the lowercase character. See Table 4-1 for a list of action codes.

One of the action code pairs is for making content bold. To make template content bold, place **\B** at the beginning of the text to be bold and **\b** and the end of the bolded text. An example of a character string that produces bolded text is as follows:

```
\BPatron Barcode:\b
```

This character string generates:

Patron Barcode:

Follow the same process to implement other action code pairs to format template content, both static or variable content.

Printing Field Information

To print field information, a field code must be entered after the **\F** action code. See Table 4-2 for a list of field codes.

Enter the following information in the template to print the **Patron Name** field stored on the server after the heading Patron Name.

```
Patron Name:  \F509
```

If Adam Jones is stored in the **Patron Name** (Formatted Name) field, this character string generates:

```
Patron Name:  Adam Jones
```

See Figure 4-6 on page 4-30.

Printing in the Alternate Font

Use the **\A** and **\a** action code pair and the alternate font capability to print barcode information. With the **Request ID** field code of 101, the following character string generates a printed barcode:

```
\A\F101\a
```

See Figure 4-6 on page 4-30 and see Figure 4-7 on page 4-31 for an example of a template that generates a printed barcode.

The alternate font can be specified by using the **Alternate Font** option on the **Preferences** dialog box.

To ensure that the printed barcode does not overlap with surrounding information, insert blank lines with the backslash character before and after the barcode specifications in the template. See Figure 4-6. This improves the scanability of the printed barcode.

NOTE:
The barcode font that is included with Voyager is called Barcode 3 of 9. If the library's scanning device requires start/stop characters for the barcode and Barcode 3 of 9 is used, enter asterisks before and after the barcode specification in the template such as ***\F101***. See Figure 4-6 on page 4-30 for an example of the character string required to generate the desired result. If a different barcode font is used, read the barcode font's documentation to determine what start/stop character must be used for that font.

Caution: If bold formatting is used with the barcode, the barcode height prints taller and the digits beneath the barcode may not be visible. If italic formatting is used with the barcode, the barcode height prints shorter. Test templates to confirm that printing generates the desired results.

Changing Font Size

Changing font size within the template content requires one of the pairs of action codes, specifically, **\s** and **\s**. In addition the new font size needs to be specified. To print certain template content using a different font size, surround the text with **\s##** (where **##** is the new font size) at the beginning of the modified text and **\s** at the end of the modified text. See Figure 4-6 on page 4-30 and see Figure 4-7 on page 4-31 for an example of the usage of **\s** and **\s**.

Inserting a Blank Line

To insert a blank line in printed output, enter a line with only the backslash (\) character in the template content. See Figure 4-6 on page 4-30 and see Figure 4-7 on page 4-31 for an example with blank lines inserted in the text.

Inserting a Tab

To format template content with a tab, use the **\T** action code. Enter the **\T** before the information to be indented. The indentation spacing that applies to this action code is determined by the Tab Width (Inches) option on the **Preferences** dialog box.

To print the following information:

Reply to Reader:

Damaged material; not available

Enter the following character string in the template:

Reply to Reader:

```
\T\F901
```

Example

Figure 4-6 is an example of a template that can be embedded in the `callslip.ini` file.

```
Line#
  1    [Call Slip Print Template]
  2    Call Number: \F301
  3    Author: \F203
  4    Title: \F202
  5    Enumeration: \F409
  6    Location: \F411
  7    Patron Name: \F509
  8    Request Date: \F102
  9    \
 10    \
 11    Reply to Reader:  Item is not available ...
 12    \F901
 13    \
 14    \
 15    \
 16    \A*\F101*\a
 17    \
 18    (Request Number)
 19    \
 20    \S24\F509\s
 21
```

Figure 4-6. Example of [Call Slip Print Template] stanza in the Callslip.ini file

Figure 4-7 shows the printed output of a call slip request when the `[Call Slip Print Template]` stanza in Figure 4-6 is used.

Call Number: PS3573.A425 C6 1983
Author: Walker, Alice, 1944-
Title: Color Purple /
Enumeration:
Location: Main Collection
Patron Name: Aura R. Stevens
Request Date: 11/3/98 01:26 PM

Reply to Reader: Item is not available ...
__Damaged
__Lost
__Not Available
__Not Found

1739403

(Request number)

Aura R. Stevens

Figure 4-7. Example of a call slip printout

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